



Solicitation

Date of Issuance: 12/29/2015

Solicitation No. 0900000202

Requisition No. 0900006644

Amendment No. 2

Hour and date specified for receipt of offers is changed: [X] No [] Yes, to: 3:00 PM CST/CDT

Pursuant to OAC 580:16-7-30(d), this document shall serve as official notice of amendment to the Solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent.

Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
(2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY and RETURN TO:

U.S. Postal Delivery or Personal or Common Carrier Delivery:

Office of Management and Enterprise Services, Central Purchasing Division, Will Rogers Building, 2401 N. Lincoln Blvd., Suite 116, Oklahoma City, OK 73105

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Description of Amendment:

a. This is to incorporate the following:

This amendment is in reference to solicitation 0900000202 posted at https://www.ok.gov/cio/Procurement/Solicitations/0900000202.html

Please see below updates and clarification information

Please note the closing date has not changed and remains February 1, 2016

- 1. For clarification, the intent statement for this solicitation reads as follows:

The intent of the State of Oklahoma is to select a vendor to facilitate Document Life Cycle products and services. It is preferred to have a single vendor and that vendor may use subcontractors, subject to the prior written approval of the State of Oklahoma. If selection of a single vendor becomes unrealistic the State of Oklahoma does have the option to make multiple awards.

- 2. Responding vendors will be required to complete and return the attached "Security Evaluation Document" with their response to the solicitation

- 3. Vendors are to use the provided Price Sheet (which is available as a Word Document at the link above). The document is composed of three primary areas: Imaging Services & Devices/Cloud Storage, Content Management, and Managed Print Services. The provided pricing sheet is not to define the exact pricing format but to serve as a guide to show the pricing structure we expect to see. As a Word document, vendors have the ability to delete rows or add rows to expand as much as needed to include all of the products and/or services they provide.

Description of Amendment - continuing

4. The tentative timeline (Section G.1) for the solicitation has been modified as follows (Please note this is tentative and may change slightly due to unforeseen circumstances):

Blind Evaluations - Thursday 2/04/15

Vendor Interviews - Monday 2/15/15

Pre-Award/Clarification Kick-Off - Wednesday 2/24/15

Contract Award - Wednesday 3/16/16

Please see below answers to vendor questions. No further questions will be accepted.

1. Can the State define the business goals for this project?

Drive enhanced security, efficiency, and improved collaboration by making it easier for staff to print, digitize, and share documents within and across agencies.

2. What metrics will be used to determine project success?--

Per the PIPS process used for this solicitation the metrics are to be developed by the vendor prior to the contract award and will be monitored/managed using the Weekly Risk Report for the duration of the project

3. Can the State define the project starting point?

Scattered, diverse implementation of various pieces across different agencies. Mostly starting from scratch.

4. For how many agencies or departments/functional areas will the project be implemented?

This is a voluntary, opt-in contract so it's impossible to say.

5. Can the State provide volume estimates in regards to how many new paper documents per day will be scanned into the solution?

No, the quantities can vary by agency.

6. Can the State provide volume estimates in regards to the scanning and imaging services that would be expected?

No, the quantities can vary by agency.

7. Can the State provide volume estimates in regards to the original paper, disc and film document destruction that would be expected?

No, the quantities can vary by agency.

8. Can the State provide volume estimates in regards to printing services that would be expected?

No, the quantities can vary by agency.

9. At approximately how many locations would print services be performed?

Description of Amendment - continuing

No, the quantities can vary by agency.

10. Do you have any project expectations to develop business process models/automate workflow?

Yes, process/workflow automation is a function that several agencies are likely to want as this is deployed.

11. Do you have business process baseline metrics to assist with efficiency improvements during the project?

This will vary from agency to agency.

12. Do you have any project expectations to develop and use electronic forms?

Yes

13. Do you have documented records retention policies?

Yes, see <http://www.odl.state.ok.us/oar/docs/grds-schedule.pdf> for State Retention Policies.

14. Are there existing systems for which you have integration requirements? If so, can you list those systems? And if so, can you explain the business needs for the integrations?

Yes, must be able to integrate with Microsoft Office 365 for features such as scan-to-email

15. Do you have requirements for integration with email? If so, can you detail those business requirements?

Yes, must be able to integrate with Microsoft Office 365 for features such as scan-to-email.

16. How many users do you project for the document management system?

The quantities can vary by agency.

17. How many users do you project per implementation?

The quantities can vary by agency.

18. Will all users be internal/staff/employee based? Or, is there a need to provide access to the general public?

Internal

19. Are there full text searching requirements?

Yes, for native text documents and OCR functions for scanned documents.

20. What kinds of documents are to be stored and maintained? (Tax, financial, HR, drawings, etc.)

This contract will be available for all state agencies to utilize, so conceivably any kind of document.

21. Do you know what kind of document characteristics by which you will index and search? If so, can you provide examples?

Description of Amendment - continuing

This may vary by agency.

22. Do you have a budget for this project? If so, can you share the budgeted amount?

This will vary from agency to agency.

23. Is there an incumbent or someone who is doing this work today? If so, can you share that information?

No existing contract with the same scope.

24. There are several points for expectations on attachment K. Will the State award a contract based on meeting 75 percent of the expectations page K?

Attachment K is NOT specifications. Attachment K is a list of what the State thinks it needs as a guide to vendors but vendors are able to remove certain sections or suggest alternates provided they give a valid reason for doing so based on their expertise. The intent is to show the kind of products and level of service we are hoping to obtain not a strict set of specifications.

25. Each manufacturer will have their own way to turn in pricing. Will the State send out a template or can we just turn in a Catalog with a percent discount of each line item?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

26. Since this is a different bid process for most vendors, in order to get the best possible responses, please extend the proposal due to 12 23 2015?

Closing date has been extended to Feb. 1, 2016

27. How many user licenses would be needed for the software?

The quantities can vary by agency.

28. Can we bid certain parts of this RFP only?

Yes.

29. Can we use HUB or minority owned business partners to help fulfill certain components?

Yes, but there is no preference given for these particular types of businesses by the State of Oklahoma

30. Based on the scope and complexity is it possible to push the date back 2 weeks?

Closing date has been extended to Feb. 1, 2016

Description of Amendment - continuing

31. How do you want the pricing submitted? The RFP pricing matrix is very vague.

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

32. Do you want a premise system (hosted in your data center) or vendor hosted (cloud)?

Our preference is a cloud-hosted solution.

33. In attachment K, one of the expectations is to provide incentives for Agencies to embrace a paperless office, what are some incentives you are seeking?

These are primarily behavioral (i.e. Making it easier to share drafts, notes, mark-up, etc... digitally than through printing and then re-scanning).

34. In attachment K, one of the expectations is for Managed Print Services including: copiers, multi-function devices, desktop printers; including all consumables for all devices except paper, repairs, maintenance, lease of device. The question is if you are excluding only paper or if you are excluding paper, and repairs, maintenance, lease of device. The way it reads is to have managed print services of the copiers, multi-function devices, desktop printers while excluding paper, and repairs, maintenance, lease of device.

This sounds like an end-user questions. What was the intent of the solicitation? Would this be reflected in the new pricing sheets?

35. In attachment K, one of the expectations is for Managed Print Services including: copiers, multi-function devices, desktop printers; including all consumables for all devices. Do you have a list of all current devices and a breakdown of monthly production by device that you could provide?

This will vary from agency to agency.

36. Is this solicitation for purchase only or are you looking for a lease option as well? If lease, what are the terms you seek? Once that is first party and offers a 60 month term (5 consecutive 1 year terms with a mutual-ramification clause)?

Yes vendors should provide lease quotes if applicable

37. In attachment K, one of the expectations is for a versatile API integration, what systems will be most likely be integrating with?

Office 365, others hard to know as each agency will have specific needs.

38. How will this contract ensure that participating organizations leverage a single source strategy for ALL output devices, access control solutions, fleet management, service, and supplies across the enterprise?

It is preferred that a single vendor be awarded and subcontract as needed for services they do not directly provide thus creating a single source for the contract; however, barring that possibility we do have the option to award parts of the award to multiple vendors

Description of Amendment - continuing

39. Will the Managed Print Strategy include a Print Server footprint reduction initiative?

No.

40. Does the State offer a platform to post tutorials or education videos and documentation for training purposes?

It should be the selected vendor's responsibility to convey training and proper use of their products

41. Describe how the scope will focus on business objectives for cost containment, audit and control, productivity, and security, while providing end-user satisfaction and acceptance.

Enabling Document Lifecycle Management for agencies will increase their ability to contain costs by reducing printing (and associated consumable costs), as well as providing them with more efficient tools for document retention, collaboration, and destruction.

42. Does the State have an established PRINT Policy that will be enforced through the use of this contract?

Currently there is no such policy that would apply across all State agencies that could be enforced. Agencies would elect to use this contract and adhere to their own internal procedures.

43. How will this contract ensure that Key Performance Metrics or Indicators are being met monthly, quarterly, or annually?

Per the PIPS process used for this solicitation the metrics are to be developed by the vendor prior to the contract award and will be monitored/managed using the Weekly Risk Report for the duration of the project

44. How will the contract vehicle be marketed to eligible agencies?

By announcement to Certified Procurement Officers, IT Service Owners and Agency Executive sponsors, Central Purchasing Website, IT Procurement Website & Open Range Website as well as Open Range outreach events.

45. Will the contract vehicle allow for vendors to pro-actively reach out to eligible agencies?

Yes. Once awarded, vendors are allowed and encouraged to contact eligible agencies to let them know about their products and services. This is a built-in benefit of a Statewide contract in that vendors on the contracts can directly market themselves to eligible agencies.

46. How will security measures for output devices be measured and implemented to ensure protection against vulnerabilities?

Devices that connect to a state network will be researched, monitored, and scanned regularly to security vulnerabilities and issues. The managed service provider will be responsible for mitigating and maintaining the appropriate security controls and posture of the devices to comply with the bid requirements.

Description of Amendment - continuing

47. What measures will be put in place and enforced by this contract to ensure sustainability and environmental goals are being met to match the State's Green Infrastructure's Initiative?

This contract will provide agencies with new tools to reduce their materials consumption by reducing the need for printing.

48. In regards to attachment K expectations - Are you seeking a comprehensive response covering all expectations listed or are you allowing for partial bid responses and if you are seeking a comprehensive response will you allow certain expectation items/services to be sub-contracted if they cannot out of the respondents direct scope of services?

It is preferred that a single vendor be awarded and subcontract as needed for services they do not directly provide thus creating a single source for the contract; however, barring that possibility we do have the option to award parts of the award to multiple vendors

49. In an effort to minimize cost risk for the state of Oklahoma would you be willing to extend pricing submission deadlines in an effort to secure the best and fixed price from partnering suppliers/subcontractors?

The closing date has currently been extended to Feb. 1, 2016.

50. In regards to attachment K - Managed Print Services can you provide figures around how many Copiers, multi-function devices, desktop printers the state currently has in their environment?

No, the quantities can vary by agency.

51. In regards to attachment K - Managed Print Services can you provide figures around how many black and white and color impressions the state currently produces in either a monthly or annual volume?

No, the quantities can vary by agency.

52. In regards to attachment K - Cloud solution for document storage are you looking for a cloud solution as an optional addition to what would normally be an on premise solution or will a cloud solution be the standard?

Cloud solution as standard

53. In regards to Attachment B for Cost Proposal and Supplier Information – Due to the broad scope of the expectations of this RFP will you accept multiple Attachment B's with additional line items to account for the following?:

A. Managed Print Services – There is a multitude of models and accessories amongst Multi-Function Devices and even desktop printers all vary in price and should require line items

B. Professional services for digital conversion of backlogged paper documents (Overlaps with) Scanning and Imaging services including: Devices, workflow creation, digital archival and conversion - This project rate is typically under a cost per scanned image which can be provided. However in order to provide a total project rate a total volume of documents that need to be digitized would be required

Description of Amendment - continuing

C. Most other items listed in Attachment K fall under a Document Management (ECM) software solution and not hardware or services. However depending on complexity there can be a variety of software design/engineering services, software modules and integration customizations. Also some software solutions require a cost per image click charge on any documents that are required to be auto indexed which will increase project cost for years 1 through 4 based off the volume for said year. All of these items should be in consideration of a separate line item

The newly released pricing sheets should clarify the pricing structure and intent the State of Oklahoma is seeking.

54. Attachment K-lists the products and services that you desire. Does a vendor have to supply all of these products and services in order to be compliant and respond to this RFP?

Attachment K is NOT specifications. Attachment K is a list of what the State thinks it needs as a guide to vendors but vendors are able to remove certain sections or suggest alternates provided they give a valid reason for doing so based on their expertise. The intent is to show the kind of products and level of service we are hoping to obtain not a strict set of specifications.

55. Attachment K- lists as an “expectation” that- Compliance with all regulatory mandates to include but not limited to: Sarbanes Oxley and HIPAA, PCI, CJIS . Does a vendor have to be compliant with all of these regulatory mandates as a corporation and/or for every product or service in order to respond to this RFP?

Hosted Solution Security initial checklist document as attachment

56. Attachment A-Cover-states that we are to provide references on Attachment E, but E has no space for references. Are we to provide references, and if so, what information and how many?

To not take up space on this form vendors should attach a separate document (a Word document is acceptable) that has any references required to validate any claims the vendor makes. If a vendor is selected for clarification any claims will need to be verified at that point so a reference sheet that gives references and indicates which claims they support will be of value but not evaluated in initial evaluations.

57. On Attachment K you list all of the services desired. On Attachment B, Cost, you only allow for a project cost per year. Are we to include a maximum ceiling price for all components listed in K as one price? How are we to price a project that we have no information on, have not been provided a Statement of Work for, and do not know any required components or requirements for?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

58. Are we to price all software components offered separately as an attachment to this RFP?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

59. You state in the RFP that we cannot charge for travel. Many of the more complex software offerings such as ECM may require us to send in a specialized Solution’s technician, which does require travel

Description of Amendment - continuing

expenses. Please allow travel expenses as a separate charge per the SOW provided by the vendor.

Travel cannot be paid for directly. If travel is an expense it needs to be priced in with a particular service. For example, if a value-add was for training you cannot price that item as "Cost + Travel" it would need to be a single rate that is inclusive of travel.

60. If the MPS portion includes equipment and printers, how is a vendor to be paid for these? Will the State buy or lease them? If they lease them, what are the terms of the lease?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

61. Under A.11 Delivery and acceptance-what is the maximum time frame that the agency has to accept the goods?

Negotiable, depending on the Products or Services delivered; OAC 260:115-9-1 specifies only "a reasonable time."

62. A.19-Termination for Convenience-Does this apply to the contract which would prevent future orders only?

A termination of the whole contract for any reason means the contract will not continue past the termination date.

63. How does a cancellation of the contract impact the in place equipment and software?

The impact of contract cancellation would be dependent on other contractual terms regarding the specific equipment and/or software.

64. Can individual projects be cancelled for convenience even if the contract as a whole is not cancelled for convenience?

Individual projects as ordered by a Customer cannot be terminated for convenience but the State may terminate a portion of the contract.

65. Would the State continue to pay for already placed software and equipment if the contract is cancelled for convenience?

Customer will pay for Products and Services delivered and accepted.

66. B. Special Provisions B.1.2-States that the State cannot contract for a period longer than 1 year, but that it may be renewed. Is the contract being referred to the contract as a whole or individual project plans requiring multi-year services?

Contract as a whole. Per AG Opinion 04-18, if a contract contains a non-appropriation clause, the contract term may be multi-year.

Description of Amendment - continuing

67. B. Special Provisions-B.3 States that we have to provide names of proposed subcontractors. Would this apply to our response to this RFP, or is this by project after award? If we have to provide this with our RFP offer, we will need the RFP extended for at least 2 weeks. Also, what is the Vendor's process with the State for adding subcontractors to the contract?

Any subcontractors will have to be approved by the State of Oklahoma prior to award. The closing date has been extended to February 1, 2016

68. B. Special Provisions-B.6-Contract Usage Reports-this is requiring that we provide a unit list price. For services required under this contract, we do not have list prices as they would be customized to meet each agencies need or Statement of Work. Please delete this requirement.

List price will be based on the price provided in vendor responses (in the newly provided pricing sheets)

69. D. Evaluation-D.2.3 Cost Proposal says respondent will provide a firm fixed price for the identified service. How can we provide a firm fixed price on Att. B when we do not know what the exact service is that the customer desires? This would be determined by the Statement of Work with individual agencies. If we are proposing software, are we to list all modules, licenses, maintenance, training etc. as a line item with a price? Are we to list just a general software category for Electronic Content Management for example, and list one price that could encompass all costs for any ECM service or module?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

70. Can a vendor take exceptions to the Solicitation and Special Provisions and still be found as responsive?

Yes. Any exceptions to the terms & conditions would ultimately have to be approved by the State of Oklahoma legal staff who would make final determination on which items can or cannot be altered, removed, or accepted.

71. What is the State's targeted ratio of MFP's to employees?

This will vary by Agency.

72. What is the State's targeted ratio of Printers to employees?

This will vary by Agency.

73. What is the State's current MFP ratio to employee?

This varies by Agency.

Description of Amendment - continuing

74. What is the State's current Printer ratio to employee?

This varies by Agency.

75. Does the State currently have budget codes established to track printer supply & maintenance costs which would establish a baseline cost for showing savings for implementing MPS & other pertinent programs?

Yes

76. Please provide the State's current average monthly usage by MFP segment/model?

Not available at this time.

77. Attachment K - Does the State require a selected vendor to perform all of the anticipated activities outlined or can a vendor just respond to those categories with which they can provide directly?

Partial responses are acceptable.

78. Does the State know with what systems a vendor must provide API integration?

Office 365 is a minimum, agencies may have specific needs.

79. Does the State currently utilize a Statewide Enterprise Content Management system or if not, does the State have a preferred Enterprise Content Management system?

No

80. Approximately, how many paper documents does the State currently have in its backlog that needs to be converted to a digital format?

This will vary from agency to agency.

81. Does the State also have size "D" & "C" drawings included in their backlog for conversion to digital format?

This is not known, the sizes can vary by agency

82. Does the State require a vendor to convert backlog to PDF-A for archival purposes?

Not required but is desirable.

83. Does the State consider Wide Format and 3D printers a part of the scope of this RFP since it is output?

Yes, though they are not firm requirements.

Description of Amendment - continuing

84. Can the State outline their overall retention policy?

Yes, see <http://www.odl.state.ok.us/oar/docs/grds-schedule.pdf> for State Retention Policies.

85. Traditionally, output/input hardware and select software solutions is currently provided on leases varying from 36 months to 60 months so in the absence of lease terms, is the vendor to provide them in their response?

Yes we are requesting lease documents and should be provided if applicable

86. Currently, vendors utilize assessments of their current processes and status to generate enhanced workflows for document management via SOW's as professional services on an hourly basis, is this acceptable to the State?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

87. Is an agency allowed to simply acquire an MFP(s) without the engagement of an MPS program?

Yes

88. Does the State require behavioral modification to achieve reduced output costs and environmental goals?

There is no fixed mandate to require reduced paper usage but vendors are welcome to propose behavior modifications in their solution(s).

89. How important are sustainability/environmental initiatives to the State and are their additional considerations for vendors that have formalized recycling programs and green products?

The State places a high value on making its operations sustainable and environmentally friendly. At this time there are not additional considerations for vendors with recycling programs or green products.

90. Can a vendor provide a discount from MSRP on the categories of products & services they provide instead of offering an exhaustive line item response to them?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

91. What is the State's process for adding new products & services to this contract during the term of the contract?

Oklahoma reserves the right to modify the terms of this Contract at any time to allow for technologies not previously identified. If there are repeated requests for an "emerging technology" and the State feels it is warranted to add such technologies, the State reserves the right to include such technology hereunder or to issue an Amendment to a contract.

Description of Amendment - continuing

92. Are vendors limited to the number of times per year they can adjust their contract regarding discontinued products & services?

No

93. Can you outline the State's expectation of a vendor for meeting the regulations under Criminal Justice Information System since this is a shared responsibility among all participants? We can provide the framework to secure the information as well as the audit capability to secure access, but it is the responsibility of the customer to adhere to establishing the levels of access which the vendor does not necessarily have control over.

Hosted solutions will be evaluated for compliance with OK Security Policy before contract award. Criteria can be found at <http://www.ok.gov.cio/documents/InfoSecPPG>

94. Will the State allow a vendor's authorized dealers to bill and receive payment directly under this contract?

Yes

95. The State's request to interview 2 people for each project may not be feasible as the direction and number of projects engaged in may require multiple individuals with varying expertise. Can the State please expand this requirement to accommodate more individuals?

The State has opted to expand the interview to three individuals. Please note that these individuals need to be the individuals that are actually working on the project (not sales/marketing) and that the individuals listed in the response are to be the same people that are interviewed.

96. Will the State consider an extension in order to provide clarification to this solicitation and all questions?

Closing date has been extended to February 1, 2016

97. Would the State of Oklahoma, OMES, consider extending the due date so that we have time to prepare an adequate response to what is a very different solicitation format than what we are used to responding to. After your explanation, we believe that we do understand and support the approach that you are using; however, we need additional time to develop the response in a way that best meets the long term needs of OMES.

Closing date has been extended to February 1, 2016.

98. Is this a replacement for SW782?

Partially yes; it will replace multiple contracts

99. How many respondents might be awarded?

It is preferred that a single vendor be awarded and subcontract as needed for services they do not directly provide thus creating a single source for the contract; however, barring that possibility we do have the option to award parts of the award to multiple vendors

Description of Amendment - continuing

100. In attachment B you are asking for initial and years 2-4 project rates. What criteria should responding vendors use to calculate these costs considering there is no project specific information included in the RFP?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

101. For Example, how many departments. In each department, how many users will need to interact with the solution?

This would vary as the number of agencies that participate is unknown and the sizes of each agency widely range.

102. Is the project referenced in the RFP intended to provide services for all State of Oklahoma agencies, boards, and commissions?

It will be available to them on an opt-in basis.

103. Is catalog pricing with predefined discounts acceptable?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit

104. In attachment K, there are a number of expectations that are referenced. Will a response be disqualified should a respondent NOT meet or provide solutions to address every expectation?

Partial responses are acceptable.

105. In Attachment B, what is the definition of a "Critical Individual"?

These would be the individuals that would actually be assigned to the project and the State would contact throughout the project. This is generally the primary and secondary (e.g. – project manager, etc) and the people submitted will be assumed to be the people assigned to the project should award be made.

106. Is there an incumbent contract for this project, or is this a new initiative?

New initiative

107. Is there an established budget for this project? If so, what is the value of the project?

This will vary from agency to agency.

108. What current software would be used to possibly integrate with ECM solution?

Office 365, plus agency-specific tools and software.

109. What level of integration is desired (i.e. Retrieval, Data Sync, Storage/Archival, Workflow)?

This will vary from agency to agency

Description of Amendment - continuing

110. Would end user training be handled by vendor, or internally?

This may vary from agency to agency.

111. Is the State or individual Agencies looking to administer the system themselves?

Each agency will administer their own instances under the direction of OMES.

112. How many agencies will this contract be available to?

All eligible State agencies can choose to participate in this contract

113. What is the average agency size (employees)?

Agency sizes can vary from under ten employees to agencies with several thousand employees.

114. Would agencies implement separately from the State system (i.e. individual servers, network, etc.)

Yes, although OMES will be involved.

115. Are SaaS, hosted, or on premise solutions desired?

SaaS and/or cloud-hosted are preferred.

116. Are all agencies using Microsoft Office and Outlook?

No, some Lotus users and potential for cloud-hosted productivity suites in the future (Office 365, Google Apps, etc...)

117. Are all agencies on similar infrastructure, and what infrastructures are used (i.e. Citrix, Windows, Terminal Servers, Workstations, etc.)?

Generally yes, but not officially standardized yet. Wide mix of Windows/Mac/Linux/Mobile endpoints, terminal servers, etc..

118. Do State Agencies use MFP's, desktop scanners, or both?

Both

119. Do any State Agencies use a service center for scanning?

Yes

120. What format is desired for scanned images (i.e. PDF, Tiff)?

Ideally we'd prefer support for multiple industry-standard image formats (PDF is an absolute must).

121. Will any State Agencies require public access?

This will vary from agency to agency, don't know in advance.

122. Which State Agency is looking to implement this system first?

OMES would likely be the first.

123. Is the State looking for a web based solution, Windows application based solution, or both?

We would prefer a flexible solution; a web-based solution that is built-on current web

Description of Amendment - continuing standards is a minimum.

124. Can OMES please elaborate on the requirement of “conversion between formats”? Is there a requirement to migrate existing electronic data to the new software?

This may vary from agency to agency.

125. How many concurrent users will be responsible for utilizing the solution in the following capacities?

- a. Retrieving Documents from the client user interface
- b. External Users (Users not having a dedicate log in to the solution)
- c. Users part of a workflow process
- d. Retrieving Documents from a line of business application
- e. The ability to scan a batch of documents
- f. The ability to perform ad-hoc scanning (scans and indexes a single document at a time)

The quantities can vary by agency.

126. Is there a requirement to allow the retrieval of documents directly from an existing line of business application?

This will vary from agency to agency.

127. Can OMES provide workflow diagrams / documentation on any of the workflow processes that is intended to be implemented within the initial phase?

This will vary from agency to agency.

128. What department or business processes does the workflow need to support in the initial phase?

This will vary from agency to agency.

129. (i.e. Human Resources, Accounts Payable, Contract Management, etc)

130. Is there a need for any Case Management functionality?

Not required, but some agencies may utilize.

131. How many scanners or multi-functional devices are initially required in order to convert paper documents into the new solution on a day forward basis?

This will vary from agency to agency.

132. What type of user and administrative training is required on the initial phase? (i.e. train the trainer, how many end users, how many administrators, web based training vs. on-site training)

Description of Amendment - continuing

This will vary from agency to agency.

133. Is there a requirement to integrate with MS Office Products or MS Outlook?

Yes.

134. What are the OMES standards on email clients, Internet Browsers, and workstation standards which need to be supported (i.e. MS Outlook, PC vs. MAC clients, and Internet Explorer vs. Safari)

The current recommended standards are: Windows 7+, Mac OS X 10.10+, Office 2011+ (Mac and PC), Internet Explorer 11, Firefox.

135. Is OMES looking for the ability to provide digital signatures or electronic signatures capabilities?

Yes.

136. What type of retention policy does the solution need to support? For instance, is the retention policy based solely on the date in which a document was created or can it be triggered on an external event such as the separation of an employee?

We need flexible retention options that can be defined based on document content type (i.e. memos, financial information, personnel information, etc..) or schedule/event-driven.

137. Can OMES provide a detail on the number of specific devices would be required for the initial phase and how they would be utilized?

- a. Copiers
- b. Multi-Functional Devices
- c. Desktop Printers
- d. Desktop Scanners
- e. Production Level Scanners

This will vary from agency to agency.

138. Are there any Reporting requirements?

This will vary from agency to agency, robust reporting tools are desired.

139. Are there any mobile requirements?

Major mobile platform support is desired (e.g. iOS, Android, Windows 10 Mobile).

140. Are there any requirements revolving around keeping track of document revisions and versions?

Document versioning is desired.

Description of Amendment - continuing

141. Can you provide detailed requirements around the types of solution retrieval are required when searching for information and/or documents:

- a. Searching by meta data fields
- b. Searching the contents of documents (such as the content of a word or PDF document)

We do not have detailed requirements on those at this point, we're looking to vendors to tell us what they can do and what they'd recommend.

142. Is it possible to meet with the individuals who are responsible for the intent and purpose behind this initiative?

No, this solicitation process consists of a blind evaluation process. Direct contact between vendors and end-users could potentially adversely impact that process

143. Will the state consider using the Texas DIR contract since everything the state is requesting is contained on that contract?

I do not believe that statement is accurate, although the DIR contract is available to agencies to use if they see fit.

144. Will each section of this solicitation be evaluated and decided upon separately...in other words, will the workflow section be separate from the scanning/imaging/archiving section and separate from the output section?

The PIPS process used for this process evaluates the expertise of any potential vendor(s). Scope of work is not an evaluation criteria and is not brought into the equation until after a vendor or vendors have been selected to proceed to clarification phase.

145. If the intent for this solicitation is one decision for the workflow, scanning/imaging/archiving and output, will the state allow the awarded contractor(s) to outsource any function to a 3rd party partner?

Subcontracting is allowable. Any subcontractors will have to be approved by the State of Oklahoma prior to award.

146. How many networked laser printers and how many direct connect printers are located in state offices? What is the breakout of color and black and white printers?

The quantities can vary by agency.

147. How many cases of 8.5x11 paper did the state purchase in FY 2015?

Varies from agency to agency

148. How much did the state spend on contract ITSW0718 (laser printer maintenance) in FY2015?

\$307,006.00

149. What are the current service hours and service onsite expectations for contract ITSW0718?

Provide service on each business day from 8 AM – 5 PM (local time) and at such other times as

Description of Amendment - continuing

agreed upon

Four (4) hour on-site response within 40 miles of a service center.

Next day on-site response within 80 miles of a service center.

Two (2) day on-site response outside 80 miles of a service center

150. Is the state willing to mandate a “printer to people” ratio and will this include MFD’s?

This will vary from agency to agency

151. What is the state’s current strategy to move away from networked and direct connect printers and toward centralized printers or MFD’s?

This will vary from agency to agency

152. How far is the state requesting people to walk to a centralized output device in order to pick up their print (e.g. 25 feet, 40 feet...)?

This will vary from agency to agency.

153. Is the state going to mandate MPS across all departments to increase the savings to that department?

Not at this time.

Onsite Support/Technical Support

154. Is the state willing to allow an office space for an onsite technician as well as room for parts and supplies?

Will vary from agency to agency

155. If the support comes through a 3rd party partner of the awarded contractor, will the state pay the contractor or the 3rd party partner?

We will pay the awarded contractor only

Multifunctional/Output devices

156. Will the state provide the feeds and speeds and overall specifications for each of the desire categories?

No

157. Will the speeds of each new output device be tied to current volumes produced in that department?

No

158. Will each agency or department be responsible to reducing printers and migrating that volume to multifunctional devices?

Yes

Description of Amendment - continuing

159. Is fax going to be a requirement with each multifunctional machine or is the state looking for a centralized fax server system?

This will vary from agency to agency.

160. Is scanning going to be a requirement of each multifunctional machine and if so, what types of file formats do the devices need to required?

This will vary from agency to agency.

161. Who will the reporting and communication need to be communicated to AND how often will it be required?

Awarded vendors will be required to use the weekly risk report referred to in the solicitation. This report should be submitted to the project manager at each agency (for their project) and to the contract manager of the overall statewide contract on a weekly basis.

162. Will each vendor be required to provide the same accessories for each category?

New pricing sheets have been provided with amendment two so vendors will have a uniform pricing structure with which to submit. As there is no specification section vendors are to submit the items they believe would best meet the needs of the agency

163. Will the state agencies allow for software and additional accessories be placed on a unit if the agency requires them?

Yes

164. How does the state define production output?

Effective and efficient start-to-finish work flow and document execution

b. All other terms and conditions remain unchanged.

Supplier Company Name (**PRINT**) _____
Date

Authorized Representative Name (**PRINT**) _____
Authorized Representative Signature

Document Imaging Conversion Services – Provide estimated pricing data for the proposed system that addresses the following components and any additional components consistent with your solution. Indicate % off MSRP?

Document indexing	Per document
Scanning Services	Per image
Mastering images to disk	Per image
Document Preparation	Per hour
Data Entry	Per hour
Conversions of microfilm to electronic images	Per image
Upload of electronic converted records to ECM solution	Per upload
Conversions of microfilm to electronic images	Per image
Upload of electronic converted records to ECM solution	Per upload
Technical support/training onsite & remote	Per hour
Document management consulting onsite & remote	Per hour
Pull Requests	Per request
Pick-up, delivery and handling	Per trip
Confidential Destruction of Paper Documents	Per box
Storage Costs	/GB
Scanning Devices	% off MSRP
Scanning Software- Licenses, Maintenance, Support & Training	% off MSRP

Content Management Software System - Provide estimated pricing data for the proposed system that addresses the following components and any additional components consistent with your solution.

License costs	Each
Training Costs	Included
Maintenance Costs	Yearly
Installation Costs	Included
Support	Included

Discuss the supported content, reporting and integration capabilities.

Managed Print Services – Print, scan, facsimile, multifunction devices, related services & managed services.

Provide estimated pricing data for the proposed system that addresses the following components and any additional components consistent with your solution.

Monochrome Copiers	% off MSRP
Color Copiers	% off MSRP
Multi-Function Devices	% off MSRP
Desktop Printers	% off MSRP
Consumables	% off MSRP
Repairs	% off MSRP
Maintenance	% off MSRP
Lease	Monthly costs/Costs per copy/page
Implementation/Project Management	% off MSRP
Support Services	% off MSRP
Installation/De-installation/Moves/Changes	% off MSRP
Training	% off MSRP
Misc.	% off MSRP

Provide a copy of the proposed lease agreement.

Security Evaluation Document

Hosted Solution Security

If responding with hosted solutions as part of this solicitation the bidder must respond to the general security questionnaire below.

As part of the solicitation evaluation you will be required to comply with the Oklahoma Security Policy and there will be an evaluation of your level of compliance by the OMES IS Security team.

The Oklahoma Security Policy evaluation criterion is located at

<http://www.ok.gov/cio/documents/InfoSecPPG>

General security questionnaire for Hosted Solutions; check which applies and provide additional information to clarify your response.

Assessment Question	Yes	No	Additional Information
Does the vendor or supplier have an Information Security Policy in place?			
Does the vendor or supplier provide information security and awareness training to their staff?			
Does the vendor or supplier separate physical access between their suppliers, vendors from the access that employees have?			
Is an inventory or register maintained with the assets associated with each information system?			
Are the security roles and responsibilities outlined in the Organization's Information Security Policy documented?			
Were verification checks performed on permanent staff at the time of job applications?			
Did these pre-employment checks include character reference, confirmation of academic and professional qualifications and independent identity checks?			
Were employees required to sign Confidentiality or Non-disclosure Agreements as a part of their initial			

terms and conditions of employment?			
Is there a procedure in place to report security incidents through management channels as quickly as possible?			
What physical border security facilities (such as card control entry gates, walls or manned reception areas) have been implemented to protect the Information processing service?			
Have controls been adopted to minimize risk from potential threats such as theft, fire, explosives, smoke, water, dust, vibration, chemical effects, electrical supply interfaces, electromagnetic radiation, flood?			
Are there policies and procedures such as Back-up, Equipment maintenance etc. in place?			
Are audit logs maintained for any changes made to the production programs?			
Is there a managed process in place for developing and maintaining business continuity throughout the organization? This might include organizational wide business continuity plan, regular testing and updating of the plan, formulating and documenting a business continuity strategy etc...			
Have all relevant statutory, regulatory and contractual requirements been explicitly defined and documented for each information system?			
Have all audit requirements and activities involving checks on operational systems been planned and agreed upon to minimize the risk of disruptions to business processes?			

Does the organization undergo regular risk assessments for security threats and risks as well as compliance to security and regulatory policies?			
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